

## **USDA Weekly Retail Turkey Feature Activity**

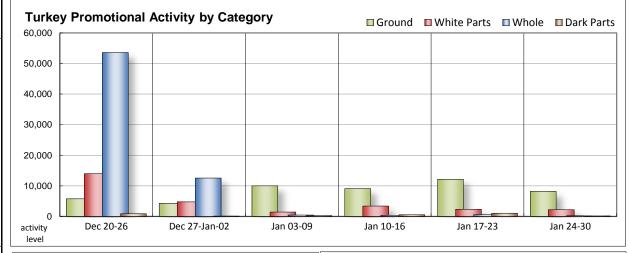
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/24 thru 01/30.

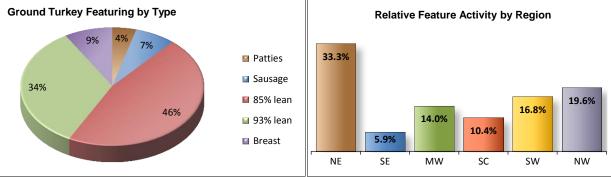
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted											
NATIONAL SUMMARY											
	THIS WEEK LAST WEEK										
Feature Rate 1/		of 23,200 tlets		of 23,200 tlets	32.1% of 23,200 outlets 0.3%						
Special Rate 4/		.6%		.8%							
Activity Index 2/		. <del>0%</del> .750		.080		.600					
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:	0.0.00	111011118	0.0.00		510.00						
Fresh - Hens					20	1.29					
" - Toms					20						
Frozen - Hens	80	1.13	440	1.18	250	-					
" - Toms	180		180		250						
PARTS:											
Breast:											
Bone-in, whole											
Fresh			10	2.99	20	2.46					
Frozen	1,200	1.88	1,140	1.86	660	1.60					
Split, bone-in											
Fresh			10	2.49							
Rotisserie	40	7.59	470	7.11	570	8.35					
Boneless, whole	60	5.47	200	5.85	30	4.25					
Cutlets	470	4.89	290	4.90	330	4.87					
Cutlets, thin sliced	380	4.99			130	4.99					
Strips											
Tenders	70	4.95	200	4.14	80	4.16					
Marinated Tenders	950	4.20	270	4.61	1,130	4.19					
Drumsticks	80	2.12	270	1.84	170	1.82					
Thighs	20	2.39	70	2.28	10	1.98					
Wings	40	1.76	220	1.83	140	1.91					
Necks	10	1.49	70	1.82	130	1.90					
Smoked Drumsticks			150	2.61	130	2.25					
Smoked Wings	20	1.99	150	2.26	140	2.19					
Smoked Necks	10	1.99	150	1.99	140	2.21					
GROUND TURKEY:	8,180		12,170		6,620						
Patties	350		690		630						
Sausage	590		· '		820						
85% lean	3,780		4,000		1,360						
93% lean	2,760		4,480		2,720						
Breast	700		1,550		1,090						
Rolls (frsh/frz 1 lb.)	630	2.17	1,720	2.64	290	2.30					
Specialty <sup>5/</sup>		0.00			450	4.04					
Patties	10		0.000	4.04	150						
93-94% lean	1,220				150						
Breast Note: rolls & specialty no	100				40						
THOLE. TOILS & SPECIALLY TIC	or infoluted	a in ground	turney tota	a and welg	incu avela	uye.					

This Week's Turkey Feature Highlights

Feature activity slows going into the end of the month. Retailers increase the number of no-price promotions. Fewer stores are promoting whole turkeys; prices are lower. Offerings decline on frozen bone-in breasts, but ads are still plentiful. Prices are slightly higher this week. Rotisserie breasts are almost absent from this week's circulars. Boneless white parts are getting more ad space, mostly marinated tenders at attractive prices. Shoppers looking for dark parts will find limited offerings. Featuring declines on ground turkey. Nearly half the ads focus on 85% lean; advertised prices are higher compared to last week, but they are still the lowest priced grind. Alternative ground selections are also less prominent as offerings decline on rolls and specialty ground turkey. Featuring declines on deli. Offerings slow on service deli, increase on self-service deli; a higher percentage of ads are for private label products.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

# USDA Weekly Retail Turkey Feature Activity Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/24 thru 01/30.

Fri. Jan 24, 2014

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.		SOUT	HEAST U.S.	MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  35.6% of 4,200 sampled outlets			
	(CT,DE,MA,MD,M	IE,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W				
	·	0 sampled outle		i e	00 sampled outle				
Special Rate 4/	3.4% of stores w	•		,	w/ no-price prome		· ·	•	
Activity Index 2/		Index = 5,720			• •		7.8% of stores w/ no-price promotions  Activity Index = 2,190		
	Price Range	Summar	Activity Index = 1,390 Price Range Summary			Price Range Summary			
	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens	1.29	10	1.29						
" - Toms	1.29	10	1.29				0.99	50	0.99
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.39 - 2.99	270	2.08	1.29 - 1.99	230	1.84	1.29 - 2.00	500	1.87
Split, bone-in									
Fresh									
Rotisserie	6.99 - 8.99	30	7.79				6.99	10	6.99
Boneless, whole	4.99 - 6.97	50	5.76						
Cutlets	3.99 - 5.99	380	4.89	4.59 - 4.99	50	4.85	4.69	10	4.69
Cutlets, thin sliced	4.99	380	4.99						
Strips									
Tenders				4.99	30	4.99	4.69	10	4.69
Marinated Tenders	3.73 - 4.39	880	4.20	4.26	70	4.26	4.00	10	4.00
Drumsticks	2.49	10	2.49	7.20	10	7.20	1.49 - 2.28	20	1.77
Thighs	2.49	10	2.49				2.28	10	2.28
Wings	2.49	10	2.49	1.39	10	1.39	1.49 - 1.69	20	1.57
Necks	2.43	10	2.49	1.53	10	1.55	1.49	10	1.49
Smoked Drumsticks							1.43	10	1.43
Smoked Wings							1.99	20	1.99
Smoked Necks							1.99	10	1.99
GROUND TURKEY:							1.99	10	1.99
Patties	2.99 - 3.99	350	3.31						
	2.49 - 3.99	400	3.52				3.19 - 3.49	110	3.48
Sausage 85% lean	2.49 - 3.99 2.33 - 2.98	570	3.52 2.71	2.49 - 3.50	520	2.76	1.99 - 3.49 1.99 - 3.50	620	3.48 2.64
93% lean	2.50 - 3.99		3.22	2.49 - 3.50	290	2.76	2.99 - 3.50	120	3.02
Breast (99-100% lean)	2.50 - 3.99 4.16 - 5.38	1,940 240	3.22 4.80	2.91 - 3.00	290	2.98 4.16	4.00 - 4.16	190	3.02 4.01
Rolls (frsh/frz 1 lb.)	4.10 - 0.30	240	4.00	4.10	20	4.10	1.49 - 2.99	360	2.25
Specialty 5/							1.43 - 2.33	300	2.20
Patties	6.99	10	6.99						
				2.00	170	2.00	2.00 4.00	100	111
93-94% lean Breast	3.49 - 3.99 5.99	150 20	3.57 5.99	3.99	170	3.99	3.99 - 4.99	120	4.14
חובמפו	5.99	20	0.99						



Fri. Jan 24, 2014

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 01/24 thru 01/30.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH C	ENTRAL U.S.		SOUT	HWEST U.S.		NORTH	NORTHWEST U.S.			
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	,UT)	(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate 1/	26.9% of 4,20	0 sampled outle	ts	56.1% of 2,9	00 sampled outle	ts	57.0% of 1,20	0 sampled outl	ets		
Special Rate 4/	4.1% of stores w	/ no-price promo	tions	0.0% of stores v	v/ no-price promo	tions	0.0% of stores w/	0.0% of stores w/ no-price promotions			
Activity Index 2/		Index = 1,620			Index = 1,910		Activity Index = 920				
riouvily mask	Price Range	Summary		Price Range	Summai	<b>'</b> V	Price Range	Summa	ary		
	(\$/pound)		Vtd Avg	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens	1.09 - 1.19	60	1.12				0.99	10	0.99		
" - Toms	0.99 - 1.19	120	1.06								
PARTS:		1									
Breast:											
Bone-in, whole											
Fresh											
Frozen	0.99 - 1.79	80	1.53				1.68 - 1.79	120	1.78		
Split, bone-in	0.00 1.70		1.00				1.00	120	1.70		
Fresh											
Rotisserie											
	0.00	40	0.00								
Boneless, whole	3.99	10	3.99								
Cutlets	4.99	30	4.99								
Cutlets, thin sliced											
Strips											
Tenders	4.99	30	4.99								
Marinated Tenders											
Drumsticks	2.19	50	2.19								
Thighs											
Wings											
Necks											
Smoked Drumsticks											
Smoked Wings											
Smoked Necks											
GROUND TURKEY:											
Patties											
Sausage				3.19	10	3.19	3.99	70	3.99		
85% lean	2.50 - 3.50	360	3.46	1.99 - 3.50	1,380	2.96	3.50	330	3.50		
93% lean	2.49 - 3.19	260	2.99	3.19 - 3.99	20	3.61	3.19 - 3.99	130	3.87		
Breast (99-100% lean)	4.39	50	4.39	4.15	40	4.15	3.99 - 4.39	160	4.03		
Rolls (frsh/frz 1 lb.)	1.49 - 2.99	100	2.20	1.99	170	1.99	0.00 - 4.00	100	7.00		
Specialty 5/	1.70 - 2.00	100	2.20	1.59	170	1.00					
Patties											
93-94% lean	3.49 - 3.99	470	3.91	3.49 - 4.59	290	3.94	3.49 - 4.59	20	3.90		
Breast	J.48 - J.88	470	3.91	3.48 - 4.38	290	3.94	5.49 - 4.59 5.99	80	5.99		
	Marketing Service Lives	<u> </u>		1			a gov/AMSv1 O/LDSMark		3.99		



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jan 24, 2014

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/24 thru 01/30.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHE	SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,N	(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
	71.2% o	f 23,200	69.9% o	f 23,200	70.7% o	f 23,200				· ·		
Feature Rate 1/	sto	res	sto	res	sto	res	85.0% of 4,600 sampled outlets		65.7% of 6,100	65.7% of 6,100 sampled outlets		
Activity Index 2/	44	740	47	700	AE	270	Activity Inde	ex = 14,100	Activity In	Activity Index = 7,810		
Activity Index 2/	44,	740	47,	790	45,	270	Price Range	Summary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,110	7.89	6,910	7.87	2,580	8.10	5.98 - 9.99	1,970 8.07	6.99 - 9.00	170	8.63	
Private Brand	2,660	7.36	1,220	7.15	2,960	7.82	6.47 - 8.99	2,190 7.36				
Category 2												
Processor Brand	3,340	5.81	3,100	5.92	4,020	5.94	4.99 - 6.99	1,680 5.76	4.99 - 6.49	530	5.99	
Private Brand	2,710	6.55	2,290	6.63	2,530	5.73	4.99 - 6.99	620 5.76	4.99 - 6.99	190	6.47	
Category 3												
Processor Brand	750	4.14	1,210	4.29	1,000	3.95			3.99	80	3.99	
Private Brand	70	4.86	1,450	5.06	240	5.04	4.77 - 5.48	60 5.25				
Turkey Ham												
Processor Brand	660	3.75	420	3.45	710	3.30	2.99 - 4.49	490 3.88				
Private Brand												
Turkey Pastrami												
Processor Brand	270	3.57	220	4.20	540	4.09	3.49 - 3.89	220 3.50				
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,010	7.74	2,770	7.77	2,360	7.81	5.98 - 8.99	1,270 7.93	5.99 - 8.99	820	8.00	
Private Brand	720	6.92	1,460	7.68	1,170	7.52	5.99 - 7.99	360 7.39	5.99	90	5.99	
Category 2												
Processor Brand	90	4.84	180	4.20	90	4.92						
Private Brand	210	5.99	1,550	5.17	1,420	5.10						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,350	2.85	10,400	3.02	-,	2.94	2.50 - 3.99	2,390 3.15	2.35 - 3.00	780	2.70	
Private Brand	2,010	3.18	950	3.16	1,160	2.98	2.99 - 3.49	90 3.09	2.50 - 3.33	1,060	3.32	
Turkey 16 oz												
Processor Brand	3,980	4.57	2,450	4.86	2,890	5.43	3.98 - 3.99	490 3.99	3.99 - 4.99	2,320	4.49	
Private Brand			60	3.99	170	4.99						
Chicken 7-10 oz												
Processor Brand	8,810	2.86	10,280	3.02	· ·	2.94	2.50 - 3.99	2,180 3.18	2.50 - 3.00	720	2.70	
Private Brand	1,990	3.18	870	3.18	1,160	2.98	2.99 - 3.49	90 3.09	3.33	1,050	3.33	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 01/24 thru 01/30.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWI	EST U.S.	SOUTH CI	ENTRAL U.S.	SOUTHWEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/									
		sampled outlets		sampled outlets	58.0% of 2,900 sampled outlets	79.5% of 1,200 sampled outlets			
Activity Index 2/	Activity Index = 8,920 Price Range Summary (\$/pound) Stores Wtd Avg			ndex = 6,600	Activity Index = 4,110	Activity Index = 3,200			
			Price Range Summary (\$/pound) Stores Wtd Avg		Price Range Summary (\$/pound) Stores Wtd Avg	Price Range Summary (\$/pound) Stores Wtd Avg			
SERVICE DELI - Turkey	(φ/ροαπα)	Otoroo Wita / Wg	(¢/podila)	Clored Wild Mig	(w/pound) Clores Tita Tity	(\$/peana)			
Category 1									
Processor Brand	5.99 - 10.99	760 7.76	6.49 - 8.99	520 7.49	6.99 - 8.99 310 7.53	6.99 - 7.99 380 7.75			
Private Brand	6.99 - 9.99	220 7.69	6.99	240 6.99	7.99 10 7.99				
Category 2									
Processor Brand	4.98 - 6.99	690 5.73	4.99 - 6.49	170 5.89	4.99 - 5.99 200 5.85	5.98 - 5.99 70 5.99			
Private Brand	4.99 - 6.99	810 6.29	5.49 - 7.99	680 7.17	6.99 - 7.99 260 7.14	7.49 - 7.99 150 7.54			
Category 3									
Processor Brand	2.99 - 4.99	530 4.20	3.49 - 4.49	80 3.99	3.99 20 3.99	3.99 40 3.99			
Private Brand				10 2.49					
Turkey Ham	0.40	00 004	0.00	40 000	0.00 0.00 140 0.40	0.00			
Processor Brand	3.49 - 3.98	20 3.64	2.69	10 2.69	2.99 - 3.39 110 3.19	3.99 30 3.99			
Private Brand									
Turkey Pastrami	2.40 2.00	00 0.04				200 200 200			
Processor Brand	3.49 - 3.98	20 3.64				3.99 30 3.99			
Private Brand									
SERVICE DELI - Chicken									
Category 1	5.79 - 7.99	TCO 7.00	5.99 - 7.99	220 7.20	7.99 10 7.99	7.99 - 11.99 20 9.99			
Processor Brand Private Brand	5.79 - 7.99 5.99 - 6.99	560 7.06 240 6.43	5.99 - 7.99 7.99	330 7.38 30 7.99	7.99	7.99 - 11.99 20 9.99			
Category 2	5.99 - 6.99	240 0.43	7.99	30 7.99					
Processor Brand	3.95 - 5.99	90 4.84							
Private Brand	5.99	210 5.99							
SELF-SERVICE DELI	0.00	210 0.00							
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.98 - 3.69	1,970 2.89	1.99 - 2.50	1,980 2.72	2.29 - 3.99 1,220 2.53	2.19 - 3.99 1,010 2.82			
Private Brand	2.50 - 3.67	330 2.68	3.09 - 3.99	130 3.95	3.00 250 3.00	2.99 - 3.00 150 2.99			
Turkey 16 oz									
Processor Brand	3.99 - 4.99	190 4.94	3.99 - 4.99	550 4.77	4.99 250 4.99	4.99 - 5.99 180 5.61			
Private Brand									
Chicken 7-10 oz									
Processor Brand	1.98 - 3.69	1,950 2.89	1.99 - 2.99	1,750 2.74	2.29 - 3.90 1,220 2.53	2.19 - 3.99 990 2.83			
Private Brand	2.50 - 3.67	330 2.68	3.99	120 3.99	3.00 250 3.00	2.99 - 3.00 150 2.99			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)